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Extra-hotel lodgings captured more than half of Italy’s summer overnight stays

ISTAT said foreign demand lifted third-quarter nights 3.0%, with non-hotel properties growing faster than hotels despite weaker domestic travel

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Italy’s summer tourism market shifted further toward extra-hotel lodging in the third quarter, with non-hotel properties taking more than half of all overnight stays and widening their lead over hotels, according to data published by ISTAT on Monday, November 23. For the hospitality industry, the figures show that seasonal demand kept growing in Italy, but a larger share of that business flowed to vacation rentals, campsites and other extra-hotel accommodations, while hotels depended more heavily on foreign travelers to offset weaker domestic demand.

ISTAT said accommodation businesses in Italy recorded more than 60 million arrivals and 249 million overnight stays between July and September 2026. Compared with the same quarter in 2025, arrivals slipped 0.5%, but overnight stays rose 3.0%, showing that overall tourism activity increased even as the number of check-ins edged down.

Foreign visitors drove that growth. ISTAT said international travelers accounted for 55.3% of total overnight stays in the quarter. Their stays increased 6.4% from a year earlier, while stays by Italian residents fell 1.0%. That split was central to the quarter’s performance across the sector, as businesses serving foreign guests benefited from stronger demand while operators more exposed to domestic leisure travel faced a

softer market.

The extra-hotel segment posted the stronger expansion. ISTAT said the category, which includes non-hotel accommodations such as holiday rentals and other private lodging used for tourism, recorded just under 27.1 million arrivals and more than 130.5 million overnight stays in the quarter. That compared with 33.4 million arrivals and nearly 118.5 million overnight stays in hotels.

Measured by overnight stays, the extra-hotel sector grew 4.2% from the third quarter of 2025, while the hotel sector rose 1.7%. ISTAT said the non-hotel segment absorbed more than half of all overnight stays in the quarter. In August alone, its share reached 54.9%, underlining how strongly summer demand is concentrating in that part of the market.

The contrast was also clear in guest mix. In extra-hotel accommodations, stays by Italian travelers were essentially flat, rising 0.1%, while stays by foreign visitors climbed 7.3%. In hotels, domestic demand weakened more clearly, with stays by Italian guests down 2.0%. That decline was partly offset by a 5.3% increase in foreign overnight stays.

For hotels, the data point to a market that is still growing but doing so unevenly. They handled the larger number of arrivals, but they trailed the extra-hotel sector in overnight volume during the peak summer quarter. That matters for revenue because longer stays support room income and related spending during the busiest months of the year. ISTAT said the growth rate in extra-hotel overnight stays was about two and a half times the pace recorded by hotels.

The quarter’s strongest monthly gain came in September, when overnight stays increased 4.4% from the same month in 2025, according to ISTAT. Even so, August remained the busiest month of the period, accounting for 39.7% of all overnight stays recorded in the quarter.

The average length of stay across all accommodation types was 4.12 nights per arrival. Italian guests stayed longer on average than foreign visitors, with resident travelers averaging 4.43 nights and international travelers 3.89 nights.

ISTAT described the quarter as one in which tourism flows showed a slight year-over-year decline in arrivals but a clear increase in overnight stays, with that increase generated entirely by foreign demand. The agency also said the spread of private lodging for tourism helped the extra-hotel segment capture a growing share of the market during the summer season.

The figures cover one of the most important periods of the year for Italian hospitality. They show a sector still benefiting from strong international travel, but also one where competition within accommodation categories is shifting. Hotels continued to attract more guests by headcount, yet non-hotel properties captured the larger volume of nights stayed, giving them the advantage in the quarter’s peak travel season.